

3.5 Send Email

This action allows you to send automatic emails with the possibility of attaching documents and linking the mail to an entity (standard or custom) in such a way that it remains historicized.

In the body of the email, it is possible to report on the classic static and/or dynamic values other general functions such as the current date/time, the link to the desired entity (internal for users or external for portal-side customers) (Figure 1)

Figure 1 shows the configuration window for sending an email. The window is titled "Action: Send email" and includes "Save" and "Cancel" buttons. The configuration fields are as follows:

- Action title: inform assigned user
- SMTP server: Default
- From: admin@vtenext.com
- To: \$11-(assigned_user_id : (Users) email1)
- Cc:
- Bcc:
- Reply to:
- Subject: Lead \$11-lastname \$11-firstname Assignment
- Relate email to: Automatic (default)
- Attach documents from: ID
- Select documents: All

Below the configuration fields, there are three dropdown menus for linking the email to an entity:

- Phone
- CRM Detail View URL
- [111] Leads (BPMN-Task: Lead assignment)

The email body is displayed in a rich text editor. The preview shows the following content:

Dear \$11-(assigned_user_id : (Users) last_name) \$11-(assigned_user_id : (Users) first_name)
Lead \$11-lastname \$11-firstname has been assigned to you.

Useful information:
Name: \$11-firstname
Surname: \$11-lastname
Account Name: \$11-company
Phone: \$11-phone

For more information click [here](#).

Figure 1 (click on the image for a higher graphic resolution)

MAIN FIELDS

- **SMTP Serve** -> from version 23.08 you can specify how to use the outgoing mail server account to be used as sender. (Figure 2)

Figure 2 shows the dropdown menu for selecting the SMTP server. The menu is open, displaying the following options:

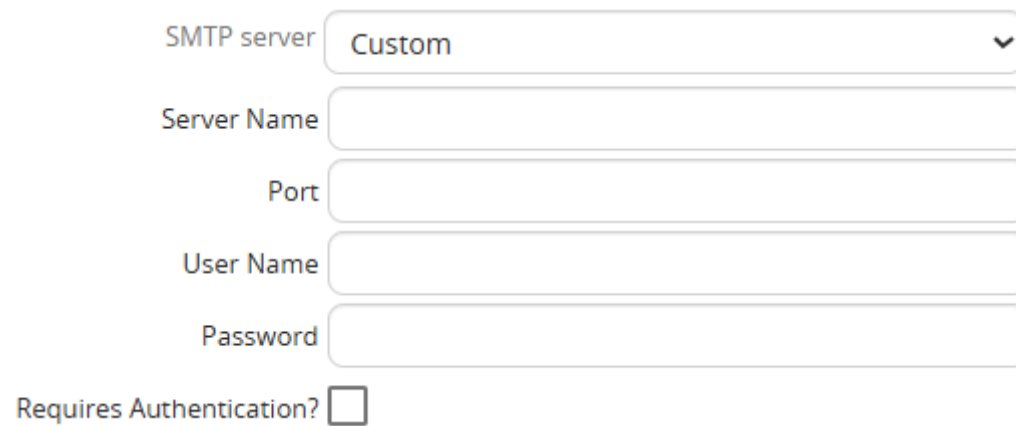
- Default
- Default
- Custom
- Global

Figure 2

- Default -> in the case that in the module Messages of the user indicated there is a configured account, the system will use the server associated with it, in the case that no account is configured

the system will use the server present in Settings -> Mail Server.

- Custom -> you can configure an outbound mail account directly within the email sending action. (Figure 3)



SMTP server Custom ▼

Server Name

Port

User Name

Password

Requires Authentication? ☐

Figure 3

- Global -> the system will use only the server configured in Settings -> Mail Server.

In addition to the three modes described above, you can select one of the accounts configured in the Messages module for the currently active users on your system.

-**From** -> represents the sender of the mail

-**To** -> represents the recipient of the mail

-**CC** -> represents copied addresses

-**CCN** -> represents the addresses in hidden copy

-**Reply to** -> represents the address to which a possible answer to the automatic mail would be sent

-**Subject** -> represents the subject of the mail

-**Link email to** -> it is possible to indicate the entity to which to link the automatic mail. The item "Automatic (default)" allows to associate the mail with the entity on which the process has been triggered

-**Attach documents from** -> you can select the entity from which to take the documents linked to it and attach them to the mail.

By clicking on "All" the system will attach ALL documents related to the entity. (Figure 4)

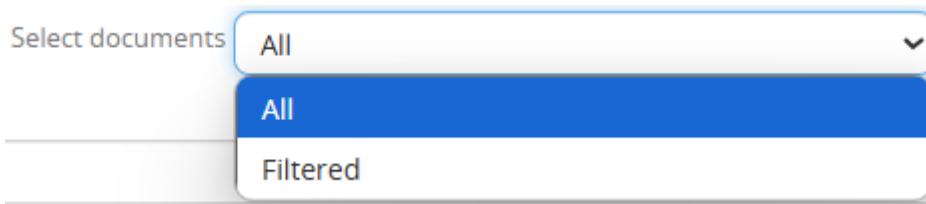


Figure 4

Ticking the "Filtered" the system will attach documents that meet the conditions inserted in the section "Conditions" (Figure 5)



Figure 5 (click on the image for a higher graphic resolution)

Revision #3

Created 2025-05-20 15:40:25 UTC by Riccardo

Updated 2025-05-30 13:31:46 UTC by Riccardo